

Grants Basic Training

Create a Grant Through the Proposal Method



Create a Grant through the Proposal Method

Training Objectives

- Understanding the use of the Entry Template
- Step by Step Instructions on Creating the Grant Through the Proposal Method
 - Create Proposal
 - Create Budgets
 - Submit Proposal
 - Generate Award
 - Complete Award Profile
 - Finalize Project Budget
 - Complete Customer (revenue) Contract

Excel Template to Enter Grants

Step 1 - Create Proposal Header

Grants Information Entry Template

Prepared by:	
Date Prepared:	
** Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.	
Part 1. Create Proposal and Budget: Navigation: FSCM>>Grants>>Proposals>>Maintain Proposal>>Add a New Value tab	
Step	Proposal Tab in Edison
1	Proposal ID # (15 is limit- <i>no spaces</i>) ¹
2	Description (20 is limit) ²
3	Reference Award Number/FAIN & Edison Interdept. Supplier Contract ID ³
4	Title (30 is limit) ⁴
5	PI ID ⁵ /PI Name (Type in Last name) ^{A.}
6	Sponsor ID/Sponsor Name ^{B.}
7	CFDA ^{E.}
8	Start Date ⁶
9	End Date ⁷
10	No. Periods Always only one (1)

Excel Template to Enter Grants

Step 2 and 3 - Create Location and Project(s)

Grants Information Entry Template

	Prepared by:
	Date Prepared:
<p>** Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.</p>	
Step II	Establish "Location" from Hyperlink in Edison, becomes Location Tab
1	Location (choose generic 0000000000 - Tennessee) set up for each project
Step III	Projects Tab in Edison (only one project should be checked as a Primary Project & Primary Project should have Primary Location checked)
1	Project ID (15 limit & begins with 2 alpha BU ^C) (no spaces) ⁸
2	Project Title (20)-enter desired description of Project
3	Department - 5 digit ^{9.&F.}
4	Subdivision - 10 digit department ^{10.&F.}
5	Institution = To agency (should default in) ^{11.&G.}
6	Department Credit - 10 digit one (100%) ¹²
7	F&A Rate Department - 10 digit one ¹³

Excel Template to Enter Grants

Step 4 - Create Project Budget Header

Grants Information Entry Template

	Prepared by:
	Date Prepared:
<p>** Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.</p>	
Step IV	Budget Tab>>Budget Header in Edison
1	Budget ID becomes Activity (funding source) ¹⁴
2	Budget ID Description ¹⁵
3	Activity Type ¹⁶
5	Save Proposal (when you have saved proposal in Edison, mark "X" in box)
4	F&A and Pricing Setup (if applicable, specific to agency) ¹⁷
	Rate Type ^I :
	FA Base ^J :
	Funded Rate ^I :

Excel Template to Enter Grants

Step 5 - Create Project Budget

Grants Information Entry Template

Prepared by:										
Date Prepared:										
** Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.										
Step V	Save and then Budget Tab>>Budget Period box "1"hyperlink in Edison									
1	BUDGET ^D	Account	Sponsor Direct (Billing Limit) ¹⁸					Cost Share ¹⁹		
			Federal	Interfed	Intermatch	Interlocal	Foundation	Nongov	State	ProgramInc
	LABOR_SALARY	70100								
	FRINGE	70200								
	TRAVEL	70300								
	PRINTING	70400								
	UTILITIES	70500								
	COMMUNICATION	70600								
	MAINT_REPAIR	70700								
	PROF_SRVC_3RD_P	70800								
	SUPPLIES	70900								
	RENT_N_INSUR	71000								
	VEHICLE	71100								
	AWARD_INDEMN	71200								
	GRANTS	71300								
	EQUIPMENT	71600								
	LAND	71700								
	BUILDING	71800								
	CONST_NON_BLDG	72000								
	TRAINING	72100								
	DATA_PROCESSING	72200								
	PROF_SRVC_STATE	72500								
	F&A_COSTS (automatic in creation of budget)	89040								
	Total Budget		-	-	-	-	-	-	-	

Excel Template to Enter Grants

Submit, Initial Agency Review, Generate, Attributes, Finalize Budget, Finish Customer Contract, and Final Review by Agency

Grants Information Entry Template

Prepared by:			
Date Prepared:			
<p>** Fill in the information below for each grant agreement/Notice of Funding before creating Customer (revenue) Contract in Edison. If the Customer (revenue) Contract has more than one project, use Modified GI-Multi worksheet.</p>			
Step VI	Submit Proposal	1st REVIEW	Generate (1st Review done before Generate Proposal to Award)
	** Navigation: FSCM>>Grants>>Proposals>>Submit Proposal		** Navigation: FSCM>>Grants>>Proposals>>Generate Award
	1 Change/Review the submit status from "Not submitted" to "Submitted" and save.		Review all previously entered information before clicking "Generate"
Part 2. Add "Attributes"		Part 5. Check/Change Rate Set in Customer Contracts	
** FSCM>>Grants>>Awards>>Award Profile>>Award tab>>Go To: Attributes		**FSCM>>Customer Contracts>>Create and Amend>>General Information	
1 Check below "Attributes for SEFA/SIS Reporting .		1. Click billing plans hyperlink>>click B101 hyperlink	
Check	Attribute Type	In the Billing Default Overrides: Invoice Form "GM_GEN" and Bill By ID	
<input type="checkbox"/>	C	2. Go back to General Information tab>>Lines tab>>Detail tab>>click "Contract Change Effective Date to grant start date, check Rate Set from below.	
<input type="checkbox"/>	F	Check	Rate Set
<input type="checkbox"/>	N		Description
<input type="checkbox"/>	R		Effective Date
<input type="checkbox"/>	T	<input type="checkbox"/>	68001
		<input type="checkbox"/>	68002
		<input type="checkbox"/>	68030
		<input type="checkbox"/>	68050
		<input type="checkbox"/>	68060
		<input type="checkbox"/>	68070
		<input type="checkbox"/>	68080
		<input type="checkbox"/>	68090
		<input type="checkbox"/>	68095
		<input type="checkbox"/>	STAT
2 Go to "Attachments" hyperlink and add attachment such as grant agreement/notice of award.		3. Change Contract Status to "Active" in General Information tab&Save. ²¹ Final	
Part 3. Make Adjustments to Project ** FSCM>>Grants>>Awards>>Project			
1	Make Project Type ^{20.&H.} "Grant" or Other (Agency specific). See "Info. 1-18" tab.		
Part 4. Finalize Project Budget ** FSCM>>Grants>>Awards>>Project Budgets			
1	Check begin and end date.		
2	Check Cost Share Direct amounts and Sponsor Budget amounts, then "Finalize".		
3	Click on the Process Monitor hyperlink to view run status in order to check errors.		

Creating a New Proposal through the Proposal Method – Create the Proposal ID

Maintain Proposal

Find an Existing Value

Add a New Value

Business Unit 

Proposal ID  

Version ID

Add

[Find an Existing Value](#) | [Add a New Value](#)

Creating a New Proposal through the Proposal Method

Enter the Proposal Header Page Information

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments | FileNet Interface

Proposal ID: NEW GRANT Version ID: V101
 Description: Grant Description Currency: USD [Add to My Proposals](#)

Reference Award Number: FAIN 12345 Federal Award Identification Number: FAIN 12345

*Title: Grant Title
 Long Description: Grant Long Description (232 characters remaining)

*PI ID: 00123078 (Tamble Jr, Richard J)
 *Sponsor ID: GR000000000 (US DEPT OF ENERGY TN)

Pre-Award Administrator:

Purpose:

*Proposal Type: New

Confidence %:

CFDA: 81.214

Status

*Proposal Status: Draft

Submit Status: Not Submitted

Generate Status: Not Generated

In Approval Process

Facilities & Admin Requested
 Foreign Application/Component
 NIH Modular Grant

Due By: Budget Express Additional Information

*Start Date: 10/01/2016 *End Date: 12/31/2017 No. Periods: [Build Periods](#)

Budget Periods Personalize | Find | | First | 1 of 1 | Last

Period	*Start Date	*End Date	Target Sponsor Budget
1	10/01/2016	12/31/2017	

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Creating a New Proposal through the Proposal Method

Enter the Proposal Header Page Information

- **Description** - The description can be twenty (20) alpha/numeric characters, including spaces. Commas, percent signs, or special characters should not be used.
- **Reference Award Number** – Information entered depends upon who the grantor is.
 - When a Federal sponsor is the grantor/sponsor, the reference award number is the FAIN number assigned to the official notice received.
 - If it is a pass-through grant from another state agency, the reference award number is the interdepartmental supplier contract number or other identification number reported on the SIS schedule.
 - If it is not Federal or pass-through, this field should be left blank.
- **Federal Award Identification Number (FAIN number)** – Information entered depends upon who the grantor is.
 - When a Federal sponsor is the grantor/sponsor, the FAIN number is the number assigned to the official notice received.
 - If this is a pass-through grant of Federal dollars from another state agency, the primary agency's Federal grant award FAIN number should be entered here.
 - If this is a pass-through grant of Federal dollars from a city, county, other state, or entity, the primary recipients' Federal grant award's FAIN number should be entered here.
 - If it is not Federal or pass-through, this field should be left blank.
- **Title** – The title can be fifty (50) alpha/numeric characters, including spaces. Commas, percent signs, or special characters should not be used.
- **Long Description** – The long description can be up to 254 alpha/numeric characters. This is an optional field.
- **PI ID** – The employee ID of the Principal Individual (PI) assigned to the Customer (revenue) Contract. PI's span across business units. The easiest way to look up a PI is to search by last name.
- **Sponsor ID** – The customer number for the Sponsor assigned to the Customer (revenue) Contract.
- **Purpose** – This is an optional field.

Creating a New Proposal through the Proposal Method

Enter the Proposal Header Page Information

- **CFDA** – The Catalog of Federal Domestic Assistance number of the Proposal/Grant/Customer (revenue) Contract. Only one CFDA can be assigned, but if a Federal Grant has multiple CFDA numbers, the grant should be broken down into multiple grants. If a grant does not have a CFDA number, a CFDA number of 00.00 should be used.
- **Start Date** – Enter the Start Date.
 - The State Date should be the Federal Award beginning date.
 - The Start Date defaults to current date.
 - The Start Date creates the Begin Date of the Proposal ID, Customer (revenue) Contract, Award Profile, Project ID, Activity, and Project Budget.
- **End Date** – Enter the End Date.
 - The End Date should be the Federal Award ending date.
 - The End Date creates the End Date of the Proposal ID, Customer (revenue) Contract, Award Profile, Project ID, Activity, and Project Budget.
- **Enter “1” in the “No. Periods” box and click the “Build Periods” button.** This will populate the Budget Period start and end dates. A Proposal/Grant/Customer (revenue) Contract should only have one period regardless if the grant is for one year or multiple years.
- Other fields are optional, and as a general rule should be left as pre-populated or blank.

Creating a New Proposal through the Proposal Method

Establish a Location for Proposal for each Project

- Click on the “Location” hyperlink to create the location tab (page) in the Proposal.

Budget Periods

Details | PHS Incomes |

Period	*Start Date	*End Date
1	10/01/2016	12/31/2017

Go To **Location** | Protocols | Component | Setup Level | Key

- Once the “Location” hyperlink has been clicked, the Location tab will appear as a page.

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments | **Location** | FileNet Interface

Proposal ID NEW_GRANT | Version ID V101

Description Grant Description

- Click on the Location box and type in “0000000000” and enter or use the lookup icon to choose “0000000000” for State of Tennessee generic location.
 - A location is required for each Project ID.
 - A “Primary” designation is required for the primary Project ID.
 - A Congressional District is not a required field, although it is marked with a “*”.
 - This location is different from the Location chartfield entered for purchasing, accounts payable, or general ledger transactions.
 - All other fields should be left as pre-populated through the default.

Creating a New Proposal through the Proposal Method

Establish a Location for Proposal for each Project

Location Find | View All First 1 of 1 Last

*Location 0000000000 Q Description TENNESSEE Foreign Primary + -

*Congressional District

Country USA United States Phone

Address 1 STATE OF TENNESSEE Ext

Address 2 Fax

Address 3

City ALL

County ALL Postal 99999

State TN Tennessee

Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

Step 4: Create the Project for the Proposal

- Click on the Projects tab. "NEXT_1" defaults in as the Project ID – delete this and enter the desired Project ID.

Proposal ID: NEW GRANT Version ID: V101
 Description: Grant Description Currency: USD

Proposal Projects Find | View All First 1 of 1 Last

Project ID: ENNEWPROJECT Primary

*Title: Project ID Title

Long Description: Grant Long Description
232 characters remaining

*Department: 32701 Environment and Conservation Dept Contact:

*Subdivision: 3273301100 Clean Water Dept Rep:

*Institution: DEN Department of Envir & Conserv

Other Contacts: **Department Credit**

SPO: SPO Contact:

F & A Distribution					Personalize	Find	First	Last
*Department	Description	Location	Comments	Percent Share				
3273301100	Clean Water			100.00				

Project Percent Share: 100.00

Go To: Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Return To: My Proposals

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

SPECIAL NOTES:

Certain fields on the Projects page (tab) will automatically default in based upon the PI ID that was entered on the Proposal page. **Most of these need to be changed!**

- The Title of the Project will default with the Title of the Proposal. This is not an issue if the grant only has one project; however if the grant has multiple projects, the Title needs to be different for each project. The Title is limited to fifty (50) alpha/numeric characters; however, it is highly recommended to use no more than thirty.
- The **Department** will default with the PI's home Department (10 digits) – this field needs to reflect a **5 digit department/allotment** for the grant and will be the five digit department associated to the Project ID on the Project Budget.
- The **Subdivision** will default with the PI's home Subdivision (5 digits) – this field needs to reflect the **10 digit allotment/department** associated with the grant.
- The Institution will default as the Agency name. The Institution is a one-to-one relationship with a business unit and is a required field. F&A or Indirect Cost processing occurs through the business unit's Institution setup.
- The **F&A Distribution Department** will default in with the PI's home Department (10 digits) – this field is used to create the offset F&A entry and revenue for an indirect cost. This field needs to reflect the **10 digit department** number associated with the grant.
- The **Department Credit** hyperlink will default the PI's home Department (10 digits) – this field needs to reflect the **10 digit department** number associated with the grant.

Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

- Click on the Title field and enter a Title for the Project ID.
- Click on the Department field and use the lookup icon to select the five (5) digit Budget department/allotment for the Proposal/Grant/Customer (revenue) Contract.
- Click on the Subdivision field and use the lookup icon to select the ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract.
- Click on the Institution field and use the lookup icon to find the corresponding Institution for the Business Unit.

To enter the Department related to F&A Distribution or Indirect Cost Department:

- Click on the Department field and enter the desired ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract and enter 100% in the percentage field.

Creating a New Proposal through the Proposal Method - Create a Project for the Proposal

The Department Credit hyperlink located just across from the Institution needs to be populated.

- Click on the Department Credit hyperlink.
- Click on the Department field and use the lookup icon to find the ten (10) digit department for the grant and enter 100% in the percentage field.

Departmental Credit Percentage

Proposal Project ENNEWPROJECT

Details			Personalize	Find	First	1 of 1	Last
*Department	Department	*Credit %					
273301100	Clean Water	100.00					

OK Cancel Refresh

- Click OK to return to the Projects tab (page).

Note: Long Description, Dept Contact and Dept Rep are not required fields and do not have to be populated.

Creating a New Proposal through the Proposal Method

- Create Budget Header for each Project ID

Step 5: Create the Budget Header for the Project

- Click on the Budgets tab (page).

The Budget ID becomes the Activity ID once the proposal has been generated into an Award. The Budget Period "Start and End Dates" automatically populate once the Proposal is saved.

- Click the lookup icon beside the Budget ID field and select a standard Activity. FEDERAL is the default.
- Click in the Description field and enter the funding source description. The Description should reflect the Budget ID through which the Proposal/Grant/Project ID is funded.
- Click the lookup icon beside the Activity Type field and select the Activity Type. The Activity Type is now a required field and should relate to the Budget ID selected.

Creating a New Proposal through the Proposal Method

- Create Budget Header for each Project ID

Proposal | Projects | **Budgets** | Resources | Certifications | Reports | Attachments | Location | FileNet Interface

Proposal ID NEW_GRANT Version ID V101
 Description Grant Description Currency USD

Proposal Project Find | View All First 1 of 1 Last

Project ID ENNEWPROJECT Title

Budget Header Find | View All First 1 of 1 Last

*Budget ID Description

*Activity Type End Date 12/31/2017
 Include in Proposal

Start Date 01/01/2016

Budget Period Personalize | Find | First 1 of 1 Last

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	01/01/2016	12/31/2017		Program Income	<input type="text"/>

F & A and Pricing Setup Total

Go To Location Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Creating a New Proposal through the Proposal Method

- Add additional Activities if needed for each Project ID

- If additional Activities are needed, click the plus sign below the Budget Header line to add additional Budget IDs/Activities.
- Select "View All" on the Proposal Project blue line and "View All" on the Budget Header line to see all Activities related to the Project ID associated to the Proposal/Grant/Customer (revenue) Contract.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for 'Proposal', 'Projects', 'Budgets', 'Resources', 'Certifications', 'Reports', 'Attachments', and 'FileNet Interface'. Below the navigation bar, there are fields for 'Proposal ID NEW GRANT', 'Version ID V101', 'Description Grant Description', and 'Currency USD'. The main content area is divided into sections: 'Proposal Project' (with 'Find | View All', 'First', '1 of 1', 'Last' controls), 'Project ID ENNEWPROJECT', 'Title Project ID Title', and 'Budget Header' (with 'Find', 'View All', 'First', '1 of 2', 'Last' controls). The 'Budget Header' section contains fields for 'Budget ID FEDERAL', 'Description Federal Funding Source', '*Activity Type FED', 'Start Date 10/01/2016', 'End Date 12/31/2017', and a checked 'Include in Proposal' checkbox. A red box highlights the 'View All' button in the 'Budget Header' section.

Creating a New Proposal through the Proposal Method - Add additional Activities if needed for each Project ID

The screenshot shows a web application interface for creating a proposal. It features a 'Proposal Project' header with search and navigation options. Below this is a 'Budget Header' section containing fields for 'Budget ID' (set to 'FEDERAL'), 'Description' ('Federal Funding Source'), 'Activity Type' ('FED'), 'End Date' ('12/31/2017'), and 'Start Date' ('01/01/2016'). A checkbox for 'Include in Proposal' is checked. Below the header is a 'Budget Period' table with one row showing the period from 01/01/2016 to 12/31/2017, with 'Program Income' as the activity and a blank field for the number of participants/trainees. An 'F & A and Pricing Setup' section follows, with a 'Total' label. At the bottom, a second budget entry is shown with 'Budget ID' set to 'STATE', 'Description' 'State Funding Source', 'Activity Type' 'STATE', and the same end and start dates. Two red arrows point to the 'Budget ID' input fields for the 'FEDERAL' and 'STATE' entries.

Provided that Steps 1 through 5 have been done, the Proposal can now be saved. Entering the Proposal has time constraints in Edison and it is highly recommended when entering a Customer (revenue) Contract through the Proposal method to enter the information necessary to create the Proposal and at least one Project ID and Project Activity before saving. If saved before completing Steps 1 through 5, auto-generated Project ID(s), incorrect Project Activity(s), or improper departments could result.

Creating a New Proposal through the Proposal Method Optional Setup Procedures – Add Additional Project(s) & Activity(s)

Step 7: Optional Setup Procedures – Add Additional Project ID(s) and Activity(s)

- Additional Projects can be added; for each Project ID and Activity added:
 - Click the plus sign below the “Proposal Projects” Blue line and select “View All” to display all related Project IDs.
 - Click on the Title field and enter a Title for the additional Project ID.
 - Click on the Department field and use the lookup icon to select the five (5) digit Budget department/allotment for the Proposal/Grant/Customer (revenue) Contract.
 - Click on the Subdivision field and use the lookup icon to select the ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract.
 - Click on the Institution field and use the lookup icon to find the corresponding Institution for the Business Unit.

Creating a New Proposal through the Proposal Method Optional Setup Procedures – Add Additional Project(s) & Activity(s)

To enter the Department related to F&A Distribution or Indirect Cost Department:

- Click on the Department field and enter the desired the ten (10) digit department for the Proposal/Grant/Customer (revenue) Contract and enter 100% in the percentage field.

The Department Credit hyperlink located just across from the Institution needs to be populated.

- Click on the Department Credit hyperlink.
- Click on the Department field and use the lookup icon to find the ten (10) digit department for the grant and enter 100% in the percentage field.
- Click OK to return to the Project tab (page).

Creating a New Proposal through the Proposal Method Optional Setup Procedures – Add Additional Project(s) & Activity(s)

Create the Budget Header for each Project ID added.

- Click on the Budgets tab (page).
- Click on the lookup icon beside the Budget ID field and select a standard Activity. FEDERAL is the default.
- Click in the Description field and enter the funding source description. The Description should reflect the Budget ID through which the Proposal/Grant/Project ID is funded.
- Click the lookup icon beside the Activity Type field and select the Activity Type. The Activity Type is now a required field and should relate to the Budget ID selected.

Establish a Location for each Project ID added.

- Click on the Location page (tab) and click View All.
- Click on the Location box and type in "0000000000" and enter or use the lookup icon to choose "0000000000" for the State of Tennessee generic location for each Project ID added.

Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity

[Proposal](#) | [Projects](#) | [Budgets](#) | [Resources](#) | [Certifications](#) | [Reports](#) | [Attachments](#) | [Location](#) | [FileNet Interface](#)

Proposal ID NEW_GRANT Version ID V101
 Description Grant Description Currency USD

Proposal Project Find | View All First 1 of 1 Last

Project ID ENNEWPROJECT Title Project ID Title

Budget Header Find | View 1 First 1-2 of 2 Last

*Budget ID Description
 *Activity Type End Date 12/31/2017
 Start Date 01/01/2016 Include in Proposal

Budget Period Personalize | Find | First 1 of 1 Last

Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	01/01/2016	12/31/2017		Program Income	<input type="text"/>
			Total		

F & A and Pricing Setup

Creating a New Proposal through the Proposal Method

Create F&A/Indirect Cost for each Project Activity

Step 8: Create Facilities and Administration (FA/F&A/Indirect Cost) Cost Pricing Setup for each Project Activity (If not applicable, proceed to step 9)

If the grant being created allows for indirect cost, and the business unit/agency wants to utilize the automated indirect cost processing functionality, the F&A (Indirect Cost) setup should be done at this point.

- Navigation:
 - Click on FSCM> Grants> Proposal> Maintain Proposal
- Enter a Business Unit and the proper Proposal ID and click on Search.
 - Click on the Budgets page (tab).
 - Click on the F&A and Pricing Setup hyperlink.

The FA Rate Type selected will default in the applicable Institution's (Business Unit/agency) FA Base, FA Rate %, Budget FA Base, and Budget FA Rate %. The FA Base with FA Rate % determines the expenditures that will produce indirect cost or SFA rows which will ultimately recognize revenue and produce a billing.

Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity

GM_BUD_FA

F & A and Pricing Setup

Proposal ID NEW GRANT
Description Grant Title

Version ID V101
Budget ID FEDERAL
Project ID ENNEWPROJECT



Institution Minus Funded

Sponsor Minus Funded

Contracts Related

*Pricing Method

*Product

F&A Set Up Find | View All First 1 of 1 Last

*Rate Type

Institution

FA Base Salaries and Benefits

Institution Rates

Find | View All First 1 of 1 Last

Effective Date

FA Rate %

Sponsor

Same as Institution

FA Base

Sponsor Rates

Find | View All First 1 of 1 Last

Effective Date

FA Rate %

Budget

FA Base Salaries and Benefits

Budget Rates

Find | View All First 1 of 1 Last

*Effective Date

FA Rate %

Creating a New Proposal through the Proposal Method

Create F&A/Indirect Cost for each Project Activity

F&A Rates and Bases need to be established for every billable Activity that should generate F&A (Indirect Cost) pricing. The system uses the rates and bases to automatically process the F&A (Indirect Cost) for transactions using the particular Project ID and Activity.

- On F&A and Pricing Setup page, defaults are "Institution Minus Funded" radio button clicked, Pricing Method "As Incurred", and Product "AS_INCURRED." All should be left as defaulted.
 - In the F&A Set Up section, click the lookup icon to the right of the Rate Type box and look up a valid value for auto-generated F&A (Indirect Cost) to process. These are unique to a business unit/agency.
 - Select the appropriate FA Rate ID for the particular Proposal/Grant/Project ID. FA Rates are business unit/agency specific.

Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity

The screenshot shows a software interface for 'F & A and Pricing Setup'. The main window has a title bar 'GM_BUD_FA' and a subtitle 'F & A and Pricing Setup'. It displays 'Proposal ID NEW GRANT' and 'Description Grant Title'. On the right, it shows 'Version ID V101', 'Budget ID FEDERAL', and 'Project ID ENNEWPROJECT'. Below this, there are sections for 'Institution Minus Funded' and 'Sponsor Minus Funded'. The 'Contracts Related' section includes a '*Pricing Method' dropdown set to 'As Incurred' and a '*Product' dropdown set to 'AS_INCURRED'. The 'F&A Set Up' section has a '*Rate Type' field and an 'Institution' section with an 'FA Base' field containing 'SLBEN' and a search icon. A red arrow points to this 'FA Base' field. A 'Look Up Rate Type' dialog box is open in the foreground, showing 'SetID 32701', 'FA Rate ID' and 'Description' dropdowns both set to 'begins with', and buttons for 'Look Up', 'Clear', and 'Cancel'. Below the dialog, a 'Search Results' table is visible:

FA Rate ID	Description
CONS	Bureau of Conservation
ENVIR	Bureau of Environment

Creating a New Proposal through the Proposal Method Create F&A/Indirect Cost for each Project Activity

The Budget FA Base and the Budget FA Rate % should typically be the same as the Institution's FA Rate and Base, and both should have the same effective date. The FA Base and FA Rate % would be the most recently approved Federal cognizant F&A/Indirect Cost Rate percentage configured by the Edison FSCM team.

GM_BUD_FA Help

F & A and Pricing Setup

Proposal ID: NEW_GRANT Version ID: V101
 Description: Grant Title Budget ID: FEDERAL
 Project ID: ENNEWPROJECT

Institution Minus Funded Sponsor Minus Funded

Contracts Related

*Pricing Method: As Incurred
 *Product: AS_INCURRED

F&A Set Up Find | View All First 1 of 1 Last

*Rate Type: ENVR Environ

Institution

FA Base: SLBEN Salaries and Benefits

Institution Rates		Find View All	First	1-2 of 7	Last
Effective Date	07/01/2015			FA Rate %	24.65
Effective Date	07/01/2014			FA Rate %	21.32

Sponsor

Same as Institution

FA Base: []

Sponsor Rates		Find View All	First	1 of 1	Last
Effective Date				FA Rate %	

Budget

FA Base: SLBEN Salaries and Benefits

Budget Rates		Find View All	First	1-2 of 7	Last
*Effective Date	07/01/2015			FA Rate %	24.65
*Effective Date	07/01/2014			FA Rate %	21.32

OK Cancel Apply

If the funded grant rate is different, change here.

Creating a New Proposal through the Proposal Method

Create F&A/Indirect Cost for each Project Activity

If the Grant calls for a different FA Base and FA Rate (normally lower) than the federally approved rate, then:

- 1) The Budget FA Rate % would need to be updated and the effective date populated with the "Start Date" of the grant.
 - 2) If the Budget FA Rate % is lower than the Institution rate, a "Waived or WFA" amount will be produced to the Project ID. These waived F&A amounts will not be recorded in the general ledger.
-
- Click OK. The Budget FA Base and FA Rate % will produce the billable SFA rows in Project Costing and create the 89040 F&A/Indirect Cost portion of the Project Budget if using the automated F&A/Indirect Cost processing. After clicking OK, the Proposal Project screen at the Budget Header page will re-appear.
 - Click Save.

If there is more than one Project ID associated to a Proposal/Grant/Contract (revenue) Contract, F&A and Pricing Setup must be entered for each Project ID.

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

Step 9: Establish Budgets for each Activity

Create the Detailed Budgets

- Click on the Proposal Budgets tab (page) if you are continuing from the previous step.
- If not continuing from previous step: Navigation> FSCM> Grants> Proposals> Enter Budget Detail.

First, Create the Billable Budgets for each Project ID's Activity(s)

Proposal ID NEW_GRANT Version ID V101
 Description Grant Description Currency USD

Proposal Project Find | View All First 1 of 1 Last
 Project ID ENNEWPROJECT Title Project ID Title

Budget Header Find | View All First 1 of 2 Last
 Budget ID FEDERAL Description Federal Funding Source
 *Activity Type FED End Date 12/31/2017
 Start Date 01/01/2016 Include in Proposal

Budget Period				Program Income	Number of Participant/Trainees
Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	01/01/2016	12/31/2017		Program Income	
F & A and Pricing Setup				Total	

- Click the hyperlink Period "1" to bring up the "Enter Budget Detail" page.

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

Enter Budget Detail

Proposal NEW_GRANT Currency USD
 Version V101 Start Date 01/01/2016 End Date 12/31/2017
 Title Grant Title Modular?

Project ID ENNEWPROJECT Budget Period 1
 Budget ID FEDERAL Start Date 01/01/2016 End Date 12/31/2017

Overall Cost Share [View FA Rate](#)

Details, CostShare, Justification

Personalize | Find | First 1 of 1 Last

[Line Data](#) [More Line Data](#)

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share	
10	<input type="text"/>	<input type="text"/>		0.00	0.00	Cost Share	<input type="checkbox"/>			
Sponsor Direct				0.00	Sponsor F&A	0.00	Total Sponsor Budget			0.00
Institution Cost Share				0.00	Institution Cost Share F&A	0.00	Total Inst C/S Budget			0.00
Third Party Cost Share				0.00			Total TP C/S Budget			0.00
Total Direct				0.00	Total F&A	0.00	Total Budget			0.00

[Return To Maintain Proposal](#)

[Save](#) [Return to Search](#) [Notify](#)

- Select the Budget Item needed by clicking the lookup icon.
- Enter the Total Direct amount (funded and billable amount on the award document) for each Budget Item. If cents are included in the Total Direct amount, the Sponsor Direct amount will round the value being entered to the nearest dollar.

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	LABOR_S	Salaries and Wages		\$0,000.00	\$0,000.00	Cost Share	<input type="checkbox"/>		

Creating a New Proposal through the Proposal Method

Establish Budgets for each Activity

- Click the plus sign if more than one Budget Item is needed. Enter all Budget Items needed for each billable Project's Budget/Activity.

Details, CostShare, Justification Personalize | Find | First 1-5 of 5 Last

Line Data More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share			
10	LABOR_S	Salaries and Wages		60,000.00	60,000.00	Cost Share	<input type="checkbox"/>					+ -
20	FRINGE	Employee Benefits		20,000.00	20,000.00	Cost Share	<input type="checkbox"/>					+ -
30	TRAVEL	Travel		10,000.00	10,000.00	Cost Share	<input type="checkbox"/>					+ -
40	SUPPLIES	Supplies		50,000.00	50,000.00	Cost Share	<input type="checkbox"/>					+ -
50	GRANTS	Grants and Subsidies		100,000.00	100,000.00	Cost Share	<input type="checkbox"/>					+ -

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

Notes:

- 1) Budget lines are automatically numbered by the system when lines are added. This numbering has no impact on grants processing.
 - 2) If indirect cost will be manually processed, an F&A_COST line would have to be added. Manual indirect cost processing is addressed fully in the Indirect Cost section of the Grant Manual.
 - 3) If indirect cost is being processed automatically, the F&A budget line will be automatically created and does not need to be entered.
 - 4) Review each Project's Direct/billable budget to make sure the amount funded is equal to the funded grant amount(s).
- Click Save once all Budget Items are entered on the Budget Detail page.

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

Second, Create the Budgets for the Cost Shared/Non-billable Project Budget/Activity(s) (if applicable)

- Navigate to the Budget Header tab to view the Cost Shared/Non-billable Activity(s).
- Click on Period "1" on the Budget ID for the appropriate Cost Shared/Non-billable Activity.

The screenshot shows a web-based interface for budget management. At the top, there are navigation tabs: Proposal, Projects, Budgets, Resources, Certifications, Reports, Attachments, and FileNet Interface. Below the tabs, the 'Budgets' section is active, showing details for a proposal with ID 'NEW_GRANT' and description 'Grant Description'. The currency is set to 'USD'. The 'Proposal Project' section shows 'Project ID: ENNEWPROJECT' and 'Title: Project ID Title'. The 'Budget Header' section displays two budget entries. The first entry has a 'Budget ID' of 'FEDERAL', 'Description' of 'Federal Funding Source', 'Start Date' of '10/01/2016', and 'End Date' of '12/31/2017'. It includes a table for 'Budget Period' with one row for 'Period 1' from '10/01/2016' to '12/31/2017' with an amount of '240,000.00'. The total for this budget is '240,000.000'. The second entry has a 'Budget ID' of 'STATE', 'Description' of 'State Funding Source', 'Start Date' of '10/01/2016', and 'End Date' of '12/31/2017'. It also includes a 'Budget Period' table with one row for 'Period 1' from '10/01/2016' to '12/31/2017'. A red box highlights the 'STATE' budget ID and its activity type, and a red arrow points to the 'Period 1' row in its budget period table.

- Enter the desired Budget Item(s) and enter the budget amounts in the Total Direct fields. Once the amounts are properly cost shared they will not add to the billable value of the Customer (revenue) Contract.

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

The following screen shot shows the values in the Cost Shared budget before they are Cost Shared:
Enter Budget Detail

Proposal	NEW_GRANT	Currency	USD
Version	V101	Start Date	10/01/2016
Title	Grant Title	End Date	12/31/2017
		<input type="checkbox"/> Modular?	

Project ID	ENNEWPROJECT	Budget Period	1
Budget ID	STATE	Start Date	10/01/2016
		End Date	12/31/2017

Overall Cost Share [View FA Rate](#)

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share	
10	LABOR_S	Salaries and Wages		20,000.00	20,000.00	Cost Share	<input type="checkbox"/>			
20	FRINGE	Employee Benefits		6,667.00	6,667.00	Cost Share	<input type="checkbox"/>			
30	TRAVEL	Travel		3,333.00	3,333.00	Cost Share	<input type="checkbox"/>			
40	SUPPLIES	Supplies		16,667.00	16,667.00	Cost Share	<input type="checkbox"/>			
50	GRANTS	Grants and Subsidies		33,333.00	33,333.00	Cost Share	<input type="checkbox"/>			
Sponsor Direct				80,000.00	Sponsor F&A		0.00	Total Sponsor Budget		80,000.00
Institution Cost Share				0.00	Institution Cost Share F&A		0.00	Total Inst C/S Budget		0.00
Third Party Cost Share				0.00				Total TP C/S Budget		0.00
Total Direct				80,000.00	Total F&A		0.00	Total Budget		80,000.00

Creating a New Proposal through the Proposal Method Establish Budgets for each Activity

- Click the Cost Share hyperlink on each Budget line to bring up the Cost Share page.

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share
10	LABOR_S	Salaries and Wages		20,000.00	20,000.00	Cost Share	<input type="checkbox"/>	

- Click in the "Cost Share Percent" field in the Cost Sharing section and enter 100. Tab out of the field. **DO NOT HIT ENTER.**

Cost Share

Budget Period 1 Start Date 10/01/2016 End Date 12/31/2017

Budget Line Number 10 Budget Item LABOR_SALARY

Cost Sharing

Total Direct	20,000.00	Cost Share Percent	<input type="text" value="0.00"/>
Sponsor Direct	20,000.00	Cost Share Direct	0.00

Creating a New Proposal through the Proposal Method

Establish Budgets for each Activity

Cost Sharing must be done to each Budget Item line that is non-billable through the Customer (revenue) Contract. When a Budget item is properly Cost Shared, no amount will exist in the Sponsor (billable) Direct Fields for the line, rather the amount will show in the fields for Institution Cost Share.

- Click Save when all Budget Item details have been entered and Cost Shared.

Enter Budget Detail

Proposal	NEW_GRANT	Currency	USD	Start Date	10/01/2016	End Date	12/31/2017
Version	V101						
Title	Grant Title			Modular?			
Project ID ENNEWPROJECT				Budget Period 1		End Date 12/31/2017	
Budget ID STATE				Start Date 10/01/2016			

Details, CostShare, Justification				View F&A Rate						
Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share	
10	LABOR_S	Salaries and Wages		20,000.00	0.00	Cost Share	<input type="checkbox"/>	20,000.00		
20	FRINGE	Employee Benefits		6,667.00	0.00	Cost Share	<input type="checkbox"/>	6,667.00		
30	TRAVEL	Travel		3,333.00	0.00	Cost Share	<input type="checkbox"/>	3,333.00		
40	SUPPLIES	Supplies		16,667.00	0.00	Cost Share	<input type="checkbox"/>	16,667.00		
50	GRANTS	Grants and Subsidies		33,333.00	0.00	Cost Share	<input type="checkbox"/>	33,333.00		
Sponsor Direct				0.00	Sponsor F&A		0.00	Total Sponsor Budget		0.00
Institution Cost Share				80,000.00	Institution Cost Share F&A		0.00	Total Inst C/S Budget		80,000.00
Third Party Cost Share				0.00				Total TP C/S Budget		0.00
Total Direct				80,000.00	Total F&A		0.00	Total Budget		80,000.00

[Return To Maintain Proposal](#)

Creating a New Proposal through the Proposal Method

Double Check Total Funding

Important note: As a double check always click on the Proposal main page to make sure the amount of the Target Sponsor Budget is the total amount being funded by the Award document.

[Proposal](#) | [Projects](#) | [Budgets](#) | [Resources](#) | [Certifications](#) | [Reports](#) | [Attachments](#) | [FileNet Interface](#)

Proposal ID: NEW_GRANT Version ID: V101
 Description: Currency: USD [Add to My Proposals](#)
 Reference Award Number: FEIN 1234 Federal Award Identification Number: FEIN 1234

*Title: New Grant
 Long Description: 254 characters remaining
 *PI ID: 00123078 Tamble Jr, Richard J
 *Sponsor ID: GR000000000 US DEPT OF ENERGY TN
 Pre-Award Administrator:
 Purpose:
 *Proposal Type: New
 Confidence %:
 CFDA: 81.214

Status

*Proposal Status: Draft

Submit Status: Not Submitted

Generate Status: Not Generated

In Approval Process

Facilities & Admin Requested
 Foreign Application/Component
 NIH Modular Grant

[Due By](#) [Budget Express](#) [Additional Information](#)

*Start Date: 10/01/2016 *End Date: 12/31/2020 No. Periods: [Build Periods](#)

Budget Periods Personalize | Find | | First 1 of 1 Last

Period	*Start Date	*End Date	Target Sponsor Budget
1	<input type="text"/> 10/01/2016	<input type="text"/> 12/31/2020	<input type="text"/> 1,556,305.00

Target Sponsor Budget 1,556,305.00

Creating a New Proposal through the Proposal Method Submit Proposal

Section 3.1.2 - Submit the Proposal

- Navigation:
 - FSCM> Grants> Proposals> Submit Proposal.
- Enter Business Unit and select the Proposal that needs to be submitted.

Submit Proposal
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Business Unit: [=] 32701

Proposal ID: [begins with] NEW

Version ID: [begins with]

PI ID: [begins with]

Sponsor ID: [begins with]

Type: [=]

Status: [=] Draft

Department ID: [begins with]

Short Title: [begins with]

Template Proposal: [begins with]

Case Sensitive

Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1 of 1 Last

Business Unit	Proposal ID	Version ID	PI ID	Sponsor ID	Type	Status	Department ID	Short Title	Template Proposal
32701	NEW_GRANT	V101	00123078	GR00000000000009	New Draft	32734		Grant Title N	

- To submit the Proposal, change the Submit Status from “Not Submitted” to “Submitted” and click Save.

Creating a New Proposal through the Proposal Method 1st Review of Submitted Proposal

- Once submitted, a submitted date is populated to the page. Click on the Notify button to send an email to the appropriate agency personnel that the Proposal has been submitted and needs to be generated. *Use the Review Checklist, Attachment 3B, before "Generate the Award" is done.*

The screenshot shows a web form for proposal submission. At the top, there are tabs for 'Submission' and 'Official'. Below the tabs, the form displays proposal details: Proposal ID NEW_GRANT, Version ID V101, Title Grant Title, and PI Name Tamble Jr, Richard J. The Proposal Status is set to Draft. A dropdown menu for '*Submit Status' is highlighted with a red box and is currently set to 'Submitted'. Other fields include Proposal Valid From (Received), Sponsor Proposal ID, Sponsor (US DEPT OF ENERGY TN), Location, and Submitted On. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. The 'Save' button is also highlighted with a red box. A link 'Return To Maintain Proposal' is visible above the buttons.

Once a Proposal is "submitted", it is ready to be "generated." When in the "submitted" status, changes can still be made if moved back to "not submitted" status and saved. If changes were made, it would be necessary to go through the "Proposal Submission" process again.

Creating a New Proposal through the Proposal Method Generate the Award

Section 3.1.3 - Generate the Award

Generating an Award translates the Proposal to the Customer (revenue) Contract.

- Navigation:
 - FSCM>Grants>Proposals>Generate Award.
- Enter Business Unit and click Search.
- Select the Proposal to be generated.

Generate Award
Enter any information you have and click Search. Leave fields blank for a list of all values.

Search Criteria

Business Unit: [=] 32701

Proposal ID: [begins with]

Version ID: [begins with]

Empl ID: [begins with]

Sponsor ID: [begins with]

Proposal Type: [=]

Proposal Status: [=]

Department: [begins with]

Short Title: [begins with]

Case Sensitive
Limit the number of results to (up to 300): 300

Search Results

View All

Business Unit	Proposal ID	Version ID	Empl ID	Sponsor ID	Proposal Type	Proposal Status	Department	Short Title
32701	ENFY15D0032738	V101	00148737	GR00000000000000	New	Submitted	32735	DEPARTMENT OF DEFENSE FY15
32701	ENFY15D0032738	V101	00148737	GR00000000000000	New	Submitted	32738	DEPARTMENT OF DEFENSE FY15
32701	NEW_GRANT	V101	00123078	GR00000000000009	New	Submitted	32734	Grant Title

Creating a New Proposal through the Proposal Method Generate the Award

Generate Award

From Proposal To Award

From Version Pre-award Spending Add to Grants Portal Security?

Project Find | View All | First 1 of 1 Last

Primary Project

From Project Project ID Title

Budget Personalize | Find | First 1-2 of 2 Last

	From Budget	Activity	Description
<input checked="" type="checkbox"/>	FEDERAL	<input type="text" value="FEDERAL"/>	Federal Funding Source
<input checked="" type="checkbox"/>	STATE	<input type="text" value="STATE"/>	State Funding Source

- Click View All to see additional Project IDs and Activity(s). If a Project ID has been created but does NOT need to be generated for the award, uncheck the "From Project" box and that Project ID will not generate for the Award.
- A "Primary" Project ID has to exist in order to generate.
- Once generated, a Proposal cannot be changed.

Creating a New Proposal through the Proposal Method Update the Award Profile

Section 3.1.4 - Update Award Profile

The Award Profile houses the Attributes associated to the Grant Award (reference Part 2) and the documentation associated to the Grant Award/Customer (revenue) Contract.

- Navigation:
 - FSCM>Grants>Awards>Award Profile.
- Enter Business Unit and Award ID and click on Search.
- Select the desired Award ID.

Award Profile
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: [=] 32701

Award ID: [begins with] New

Project: [begins with]

Description: [begins with]

PI ID: [begins with]

Proposal ID: [begins with]

Case Sensitive
Limit the number of results to (up to 300): 300

Search | Clear | Basic Search | Save Search Criteria

Search Results

View All | First | 1 of 1 | Last

Business Unit	Award ID	Project	Description	PI ID	Proposal ID
32701	NEW_GRANT	ENNEWPROJECT	Grant Title	00123078	NEW_GRANT

Find an Existing Value | Add a New Value

Creating a New Proposal through the Proposal Method Update the Award Profile

- Click on the Attributes hyperlink at the bottom.

The screenshot displays a web application interface for managing awards. The top navigation bar includes tabs for Award, Funding, Resources, Certifications, Terms, Milestones, Key Words, Funding Inquiry, Attachments, and FileNet Interface. The main content area contains several input fields and dropdown menus for award details:

- Award ID:** NEW_GRANT
- Reference Award Number:** Notice of Award
- Federal Award Identification Number:** FEIN number XXXXX
- Title:** Grant Title
- Long Description:** Grant Long Description (with a character count of 232 characters remaining)
- Award PI:** Tambler Jr, Richard J
- Sponsor:** US DEPT OF ENERGY TN
- Post Award Administrator:** (empty field)
- Purpose:** (empty field)
- Status:** Accepted
- Award Type:** Grant
- CFDA:** 81.041
- Proposal ID:** NEW_GRANT
- Version ID:** V101
- Start Date:** 10/01/2016
- End Date:** 12/31/2017

At the bottom of the interface, there is a navigation bar with several links: View Contract, View Proposal, Additional Information, Grant Administrator, and Sponsor Website. Below this, there is a table for 'Associated Project' with columns for PC Business Unit, Project, and Description. The table contains one row with PC Business Unit 32701, Project ENNEWPROJECT, and Description Project ID Title. At the very bottom, there is a 'Go To:' section with several links: Sponsor, Protocols, Attributes (highlighted with a red box), Department Credit, Notepad, Award Modifications, and Supplemental Data.

Creating a New Proposal through the Proposal Method Update the Award Profile

- Click on the blue plus sign to add needed Attributes.
- Click on the lookup icon to the right of the Attribute Type and select the Attribute(s) needed for SEFA reporting. See separate Division of Accounts SEFA reporting instructions.
- Click on View All to see Attributes
- Click Save.

Detail Find | [View 1](#) First 1-2 of 2 Last

*Attribute Type  Federal Government + -

Attribute Value

Comments 

*Attribute Type  Cash + -

Attribute Value

Comments 

Creating a New Proposal through the Proposal Method Update the Award Profile

- Click on the Award tab and click the Attachments link.

Award | Funding | Resources | Certifications | Terms | Milestones | Key Words | Attributes | Funding Inquiry | Attachments | FileNet Interface

Award ID: NEW_GRANT
 Reference Award Number: Notice of Award
 Federal Award Identification Number: FEIN number XXXXX

Title: Grant Title
 Long Description: Grant Long Description
 232 characters remaining

Award PI: Tamble Jr, Richard J
 Reporting Role

Sponsor: US DEPT OF ENERGY TN
 Post Award Administrator

Purpose

Status: Accepted
 Award Type: Grant

CFDA: S1.041

Proposal ID: NEW_GRANT
 Version ID: V101
 Start Date: 10/01/2016

Attachments

- Click on the Add Attachment button.

Tn Gr Attachments

Business Unit: 32701 Award ID: NEW_GRANT

Details Personalize | Find | 1 of 1 | Last

View	File Name	TN Attachment Uploader	Uploader's Name	Date/Time Created
View				

Adding large attachments can take some time to upload, therefore, it is advisable to save the file locally before uploading large attachments.

Add Attachment

Creating a New Proposal through the Proposal Method Finalize Project Budget

Section 3.1.5 - Finalize Project Budget

- Navigation:
 - FSCM>Grants>Awards>Project Budgets.
- Enter Business Unit and Project ID and click on Search.

Project Budgets

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Business Unit: [=] 🔍

Project: [begins with] 🔍

Budget Plan ID: [=]

Budget Period: [begins with]

Budget Type: [=]

Description: [begins with]

Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Creating a New Proposal through the Proposal Method Finalize Project Budget

- The Budget Item, Fund, Department (5 digit), Account (5 digit), Location CF, Activity, Analysis Type and Amount are all required fields and will default into the budget. All should be reviewed.
- The most common required change is the Fund. For example, if the Business Unit/Agency has multiple funds, the Fund will need to be changed since only one Fund value defaults. If revisions are needed after the budget is finalized, corrections should be made by adding lines and finalizing again and then subtracting lines and finalizing another time.
- An un-finalized budget has open boxes, not greyed out as they would appear when finalized.

Note: The following screen shots reflect a smaller personalized view of the Project ID's budget. See separate document on Personalizing the Project Budget.

Creating a New Proposal through the Proposal Method

Finalize Project Budget

Budget Detail

Project ENNEWPROJECT Project ID Title

Budget Period 1 Begin Date 10/01/2016 End Date 12/31/2017 Finalize Process Monitor

Project Budget Summary

Cost Share Direct \$80,000.00 Currency USD Total Budget \$320,000.00
 Sponsor Budget \$240,000.00 Security Status None

Budget Amounts for Period Personalize | Find | View All | [Print] First 1-11 of 11 Last

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Amount
F&A_COSTS	11000	32734	89040	19010	FEDERAL	BUD	19,720.00
FRINGE	11000	32734	70200	19010	FEDERAL	BUD	20,000.00
GRANTS	11000	32734	71300	19010	FEDERAL	BUD	100,000.00
LABOR_SALARY	11000	32734	70100	19010	FEDERAL	BUD	60,000.00
SUPPLIES	11000	32734	70900	19010	FEDERAL	BUD	30,280.00
TRAVEL	11000	32734	70300	19010	FEDERAL	BUD	10,000.00
FRINGE	11000	32734	70200	19010	STATE	CBU	6,667.00
GRANTS	11000	32734	71300	19010	STATE	CBU	33,333.00
LABOR_SALARY	11000	32734	70100	19010	STATE	CBU	20,000.00
SUPPLIES	11000	32734	70900	19010	STATE	CBU	16,667.00
TRAVEL	11000	32734	70300	19010	STATE	CBU	3,333.00

Save Return to Search Notify

Creating a New Proposal through the Proposal Method Finalize Project Budget

- Click on the Grants Detail tab to see which lines have been Cost Shared – note the Cost Sharing box is checked.

Budget Detail

Project ENNEWPROJECT Project ID Title

Budget Period 1 Begin Date 10/01/2016 End Date 12/31/2017 **Finalize** Process Monitor

Project Budget Summary

Cost Share Direct \$80,000.00 Currency USD Total Budget \$320,000.00
 Sponsor Budget \$240,000.00 Security Status None

Budget Amounts for Period Personalize | Find | View All | First 1-11 of 11 Last

General Project Detail Commitment Control Detail **Grants Detail**

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Facilities and Administration	Cost Sharing
F&A_COSTS	11000	32734	89040	19010	FEDERAL	BUD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FRINGE	11000	32734	70200	19010	FEDERAL	BUD	<input type="checkbox"/>	<input type="checkbox"/>
GRANTS	11000	32734	71300	19010	FEDERAL	BUD	<input type="checkbox"/>	<input type="checkbox"/>
LABOR_SALARY	11000	32734	70100	19010	FEDERAL	BUD	<input type="checkbox"/>	<input type="checkbox"/>
SUPPLIES	11000	32734	70900	19010	FEDERAL	BUD	<input type="checkbox"/>	<input type="checkbox"/>
TRAVEL	11000	32734	70300	19010	FEDERAL	BUD	<input type="checkbox"/>	<input type="checkbox"/>
FRINGE	11000	32734	70200	19010	STATE	CBU	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GRANTS	11000	32734	71300	19010	STATE	CBU	<input type="checkbox"/>	<input checked="" type="checkbox"/>
LABOR_SALARY	11000	32734	70100	19010	STATE	CBU	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SUPPLIES	11000	32734	70900	19010	STATE	CBU	<input type="checkbox"/>	<input checked="" type="checkbox"/>
TRAVEL	11000	32734	70300	19010	STATE	CBU	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Creating a New Proposal through the Proposal Method Finalize Project Budget

- Click Finalize and this message will appear. Click OK.



- Click on Process Monitor hyperlink and Refresh until Run Status is Success and Distribution Status is posted.
- Click on the Details hyperlink.

Process List						Personalize	Find	View All	First	1-12 of 12	Last
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details		
<input type="checkbox"/>	23947851		Application Engine	PC_WRAPPER	maryl0117001	03/31/2016 3:21:54PM CDT	Success	Posted	Details		

- Click on the Message Log hyperlink.

Request Created On	03/31/2016 3:21:54PM CDT	Parameters	Transfer
Run Anytime After	03/31/2016 3:21:54PM CDT	Message Log	View Locks
Began Process At	03/31/2016 3:22:14PM CDT	Batch Timings	
Ended Process At	03/31/2016 3:24:17PM CDT	View Log/Trace	

- Click on the "Message Log" hyperlink, click View All and verify the number of Row(s) Edited with No Errors and the number of Row(s) Loaded equal. You may see a lot of other warnings which can be ignored for budget finalization purposes. If there are errors in the budget creation, please contract Division of Accounts Grant Accounting Group.

10	3:24:03PM	0 Row(s) were Edited with Errors	Explain
10	3:24:03PM	11 Row(s) were Edited with No Errors	Explain
10	3:24:03PM	11 Row(s) were Loaded	Explain

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

Section 3.1.6 - Customer (revenue) Contract Adjustments and Activation

- Navigation:
 - FSCM>Customer Contracts> Create and Amend> General Information.

General Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: [dropdown] 32701 [search]

Contract: [dropdown] [text] [search]

Description: [dropdown] [text] [search]

Sold To Customer: [dropdown] [text] [search]

Customer Name: [dropdown] [text] [search]

Contract Status: [dropdown] [text] [search]

Processing Status: [dropdown] Pending [dropdown]

Contract Type: [dropdown] [text] [search]

Contract Classification: [dropdown] [text] [search]

Region Code: [dropdown] [text] [search]

Contract Administrator: [dropdown] [text] [search]

Master Contract #: [dropdown] [text] [search]

Case Sensitive

Limit the number of results to (up to 300): 300

Search | Clear | Basic Search | Save Search Criteria

Search Results

View All

Contract	Description	Sold To Customer	Customer Name	Contract Status	Processing Status	Contract Type
ENEXTDECOPER	ENEXTDECOPERATIONS	GR0000000000109	TN DEPT OF ENVIRONMENT AND CONSERVATION	PENDING	Pending	GRANTS
NEW_GRANT	Grant Title	GR0000000000009	US DEPT OF ENERGY TN	PENDING	Pending	GRANTS

- Type in Contract name or Search by "Processing Status" (choose "Pending" from the dropdown) on the Find Existing Value tab.

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- Select the Customer (revenue) Contract requiring completion.
- Click on the Billing Plans hyperlink on the General Tab of the Customer (revenue) Contract.

The screenshot displays a web-based contract management interface. At the top, there are tabs for 'General' and 'Lines'. The main content area shows contract details for 'NEW_GRANT', including the customer 'US DEPT OF ENERGY TN' and a 'PENDING' status. A yellow 'Add to My Contracts' button is visible. Below this, various fields are organized into two columns: contract metadata (Description, Admin, Region Code, Type, Currency, Exchange Rate, Signed Date, Role) and operational details (Processing Status, Amendment Status, Business Unit, Classification, Dates, Update Info). At the bottom, a navigation bar contains several links: 'Billing Plans' (highlighted with a red box), 'Revenue Plans', 'Milestones', 'Renewals', 'Amount Allocation', and 'Supplemental Data'. There are also expandable sections for 'Other Information' and 'Summary of Amounts'.

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- Click on the Plan "B101" hyperlink on the Assign Billing Plan page.

Assign Billing Plan

Contract NEW_GRANT Grant Title
Sold To Customer US DEPT OF ENERGY TN

Contract Lines to be Assigned / Unassigned						
Line	Product	Line Description	Billing Amount	Price Type	Plan	Plan Description
<input type="checkbox"/> 1	AS_INCURRED	As Incurred		Rate	B101	Grants As Incurred

- In the Billing Defaults Overrides section:
 - Enter the Invoice Form: "GM_GEN"
 - Enter the Bill by ID: "GM_CASH"
- Leave all other fields on this page as defaulted in or blank. The Billing Plan will become "Ready" when the Customer (revenue) Contract status is made "Active."

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

Billing Plan General Assign

Billing Plan General | Events | Tax Parameters | History

Contract: NEW GRANT
 Sold To Customer: GR0000000000009 US DEPT OF ENERGY TN
 Billing Plan: B101 Grants As Incurred
 BI Unit: 32701
 Bill To: GR0000000000009 US DEPT OF ENERGY TN
 Currency: USD

Description: Grants As Incurred
 Billing Method: As Incurred
 *Billing Status: Pending
 Ready at Activation:

Customer Information

BI Unit: 32701
 *Bill To Customer: GR0000000000009
 Addr Num: 1
 Bill To Contact:

Environment & Conserv
 US DEPT OF ENERGY TN

Transaction Options

Bill Currency: Contract Currency

Retainage Options

Items previously held as Retainages

Bill
 Write-off
 Hold

Tolerance Options

Minimum Bill Amount: 0.00

Final Bill

Billing Options

Bill Type: GM
 Bill Source: GRANTS
 Summarization Template ID:
 Purchase Order:

Pre Approved
 Direct Invoice

Billing Header Note | Internal Notes | Preview Summarization Template

Billing Default Overrides

Invoice Form: GM_GEN
 Cycle ID:
 Bill By ID: GM_CASH
 Payment Method:

View Customer Defaults
 Grants Cash Bill by Award

Payment Terms:
 Billing Inquiry:
 Billing Specialist:
 Billing Authority:

Letter of Credit Information

Letter of Credit ID:

View All | First | 1 of 1 | Last

Contract Line Num	Letter of Credit Document ID	Subaccount ID	LOC Doc ID End Date	Inactive Doc ID
1				

Return to Assign Billing Plan

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- Click Save.
- Click the "Return to Assign Billing Plan" hyperlink at the bottom.
- Click the "Return to General Information" hyperlink at the bottom.
- Review and make changes needed to the Billing Limit and Accounting Rate Set.
- Click on the Lines tab.



- Click on the "Detail" tab in the Contract Lines section.
- Click on the "Contract Terms" hyperlink.

Contract Lines							
General Detail LQC Detail Billing Amount Details Revenue Amount Details							
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms
▼ Actions	1	AS_INCURRED	As Incurred	Rate	Pending	Pending	Contract Terms

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- When reviewing the Related Projects page, the Project ID and Activities are both reflected on the Contract; however, the Billing Limit should only reflect the amount due from the Sponsor/Customer of the Grant/Contract.

Related Projects

Contract Number NEW_GRANT Sold To Customer US DEPT OF ENERGY TN
 Amendment Number Contract Status PENDING

Contract Line 1 Price Type Rate
 Product AS_INCURRED
 Description As Incurred

PC Business Unit 32701 Transaction Limits Review Limits
 Billing Limit 240,000.00
 Revenue Limit 240,000.00 Retainage ID
 Discount ID Tiered Pricing Tiered Pricing

Associated Rates Personalize | Find | 1 of 1 | Last

Effective Date	Status	Rate Selection	Rate Set
1 01/01/1900	Active	Rate Set	68001 Rate Set

Associated Projects & Activities Personalize | 1-2 of 2 | Last

*Project	*Activity	Description	Description
<input type="radio"/> ENNEWPROJECT	FEDERAL	Project ID Title	Federal Funding Source
<input type="radio"/> ENNEWPROJECT	STATE	Project ID Title	State Funding Source

Create Project Create Activity All Activities

[Return to General Information](#) [Amount Allocation](#)

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- The Federal Rate set (68001) will default as the Associated Rates, and the Effective Date defaults as 01/01/1900, this should always be changed to the start date of the Grant. In order to change the Effective Date or the Rate Set, a new line must be added.
- To change the Effective Date, click the blue plus sign next to the Rate Set. The added row will be on the top and will default with the current date as the Effective Date, but this should be changed to the official start date of the Grant.
- Change the Rate Set from 68001 (Federal) if a different Rate Set is needed.

Associated Rates					Personalize Find	First	1-2 of 2	Last
	Effective Date	Status	Rate Selection	Rate Set				
1	10/01/2016	Active	Rate Set	68001	Rate Set			
2	01/01/1900	Active	Rate Set	68001	Rate Set			

- Click on Save.
- Click on the "Return to General Information" hyperlink.
- Click on the General Tab.

Contract Number NEW_GRANT

Sold To Customer: US DEPT OF ENERGY TN

*Contract Status:

- Click the lookup icon to the right of Contract (revenue) Status and change the status from "Pending" to "Active."

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

Note: When changing the Customer (revenue) Contract status, the following error message may appear, "A Letter of Credit Reference ID is required at the Contract Line level when the Method of Payment is set to "Letter of Credit"". Follow these supplemental steps.

- ❖ Click OK in the message.

Message

A Letter of Credit Reference ID is required. (9857,68)

A Letter of Credit Reference ID is required at the Contract Header level when the Method of Payment is set to "Letter of Credit".

OK

- ❖ Click "More" in the lower right hand corner of the General Tab for the Customer (revenue) Contract next to Amount Allocation.
- ❖ Click on dropdown to the right of "More" and select Billing Options.

The screenshot shows a software interface with several tabs: "Billing Plans", "Revenue Plans", "Milestones", "Renewals", and "Amount Allocation". Below the tabs are buttons for "Save", "Return to Search", and "Notify". The "Billing Options" tab is active. In the bottom right corner, a "More" dropdown menu is open, showing a list of options: "Attachments", "Billing Options", "Conversations", "Internal Notes", "More", "Payment Terms", "Prepays", "Progress Payments", "Revenue Forecast", "Sales Order", "Service Orders", "Sold To Address", "Support Teams", and "View Forecast". The "Billing Options" item is highlighted in blue. Two red arrows point to the "More" dropdown and the "Billing Options" item.

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

- ❖ Scroll down and change the radio button from Letter of Credit to Cost Reimbursable and save.

The image shows two sequential screenshots of a web form titled "Grants Information". In the first screenshot, the "Letter of Credit" radio button is selected. In the second screenshot, the "Cost Reimbursable" radio button is selected, and a red arrow points to it from the right.

- ❖ Click back on the General Tab and change the Contract Status from "Pending" to "Active."

The screenshot displays the "General" tab of a contract management system. The "Contract Status" dropdown menu is highlighted with a red box and contains the text "ACTIVE". Other visible fields include "Contract Number NEW_GRANT", "Amendment Number 000000000", "Description Grant Title", "Contract Admin", "Region Code", "Contract Type GRANTS", "Currency Code USD", "Exchange Rate Type CRRNT", "Contract Signed 10/01/2016", "Contract Role", "Processing Status Active", "Amendment Status", "Business Unit Environment & Conserv", "Contract Classification Standard", "Last Amended", "Start Date 10/01/2016", "End Date 12/31/2017", "Last Update Date/Time 04/01/2016 7:46:13AM", and "Last Update User ID maryl0117001".

Creating a New Proposal through the Proposal Method Customer Contract Adjustments and Activation

Expenditures can now be incurred on the Grant/Award, and billing is able to be processed. If expenditures occurred before the Customer (revenue) Contract was made active (while in a pending state), the transactions would need to be re-priced by the Edison Grants team via an Edison Help Desk ticket.